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PURCHASING USER MANUAL

REQUESTING A PRICE CHECK

INTRODUCTION

When adding items to a requisition, a person can ask a purchaser about the price of an item so they know, for example, whether or not they have the funds available or if they might exceed a spending limit. On the **Requisitions** screen, a user who is a requester, authorizer, or fiscal coder can request a price check from a purchaser.

TO REQUEST A PRICE CHECK OF A REQUISITION ITEM

The requisition must be saved with line items added (a price must be entered on each line item). This will enable the full line item Menu.

Requester/Authorizer/Fiscal Coder:

1. Click **Menu** next to the line item.
2. Click **Price Check**.

Figure 1 - Line Item Menu

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Workflow
		Awaiting Fiscal Coding		Shocks	4	Each	120.00	480.00	walkthru
		Awaiting Fiscal Coding		air intake	1	Each	215.00	215.00	walkthru

3. The **Status** will change to **Awaiting Price Check**.

Figure 2 - Price Check Status

Status: **Awaiting PO Price Check**

Requested by: TU ANH BOCKENSTETTE (10/18/2007) Edited by: JAMES CARTER (04/22/2008)

Void Requisition

Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Workflow
		Awaiting Price Check		Shocks	4	Each	120.00	480.00	walkthru
		Awaiting Fiscal Coding		air intake	1	Each	215.00	215.00	walkthru

Purchaser:

1. The purchaser will now see a **Price Check** tab on their screen.

Figure 3 - Price Check tab

PO #	Required by	Vendor	Status
Select 009TV	04/28/2008	BEST BUY STORES LP	Some items received
Select 6235-Sx		OPTICAL SURVEILLANCE SYSTEMS INC	All items ordered

2. On the **Price Check** screen, enter the actual price in the **Price** field.

Figure 4 - Price Check screen

Notes	Atch	Req #	Item #	Description	Qty	U/M	Price	Sub Total	Sfx	Vendor	Business Address	City	St	Zip	Area	Phone
Menu	Done		WRK80028	Shocks	4	Each	120.00	\$480.00								

3. If needed, click the requisition number (**Req #**) to view the requisition details.
4. To add explanatory notes, click the **Notes** icon
5. To add scanned documentation, click the **Atch** icon.
6. Click **Done** when finished. The line item will be removed from the **Price Check** screen. If there are no more price checks, the **Price Check** tab will not be displayed.
7. To cancel a price check (for example, if a requester verifies the price with the vendor), click **Menu** next to the line item and click **Cancel Price Check**.





Figure 5 - Cancel Price Check

Notes	Atch	Req #	Item #	Description	Qty	U/M	Price	Sub Total	Sfx	Vendor	Business Address	City	St	Zip	Area	Phone
Menu	Done		WRK80028	Shocks	4	Each	139.00	\$556.00								

Requester/Authorizer/Fiscal Coder:

1. On the Requisitions screen, the line item status will be **Price Check Complete** (or **Price Check Cancelled** if it was cancelled) and the updated price from the purchaser will be automatically entered.

Figure 6 - Price check complete

Add Item		Coding Complete				Clear All Items			
Total: \$771.00				<input type="checkbox"/> Vendor Info		<input type="checkbox"/> Coding Info			
				<input type="checkbox"/> Receiving Info		*Press F3 for Lookup			
Notes	Atch	Status	Item #	Description	Qty	U/M	Price	SubTotal	Workflow
Menu		 Price Check Complete		Shocks	4	Each	139.00	556.00	walkthru
Menu		 Awaiting Fiscal Coding		air intake	1	Each	215.00	215.00	walkthru

2. Click the **Notes** and **Atch** icons if the purchaser to view any notes or attachments from the purchaser.
3. You can accept the price or change the line item as needed.
4. Continue with the requisition process.